

Business Intelligence Grievance Master Agreement Report via Portal

Purpose	Use report to easily obtain detailed grievance data based on selection criteria. Obtain total counts of the primary (as designated by each agency) Article/Sub-Article of each Grievance under its respective Master Agreement. This report will break by agency and will sort by Article Name and corresponding Sub-Article Name(s) it was filed with. The report will show Sub-Articles by name (if named). Grievances without a named Sub-Article will be included in the count for the Article Name itself. May be used by Agencies and Labor Relations Office as they prepare to report to the Governor's Office for GMAP.
Trigger	Unique requests for data on grievance counts or activity, the need to audit data entries, GMAP preparations.
Prerequisites	You have grievance data entered into HCM and within six months of receiving system access you have successfully participated in Grievance Tracking training.
End User Roles	In order to perform this transaction you must be assigned the following role with reporting access: Decentralized Grievance Administrator Decentralized Grievance Inquirer

Change History	
Date	Change Description
July 20, 2012	Created.
February 5, 2013	Corrected link in the menu path

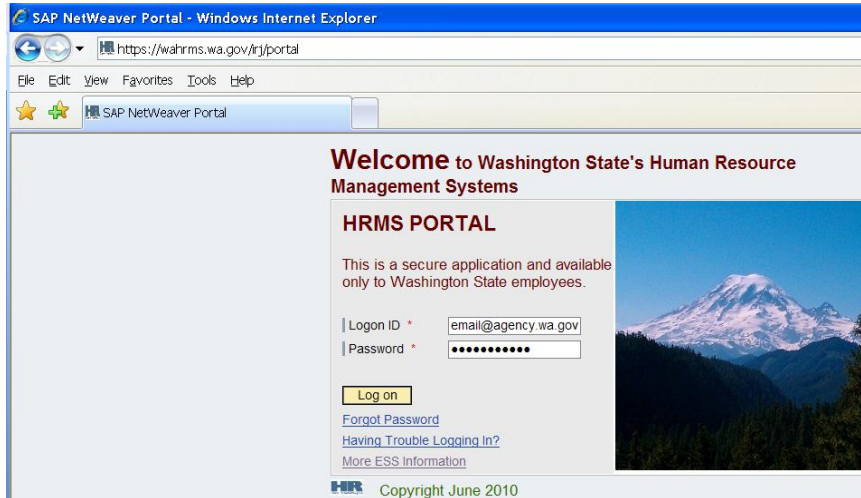
Menu Path <https://wahrms.wa.gov/irj/> → BI Reports → Grievance Reporting → Grievance Master Agreement Report

Transaction Code NA

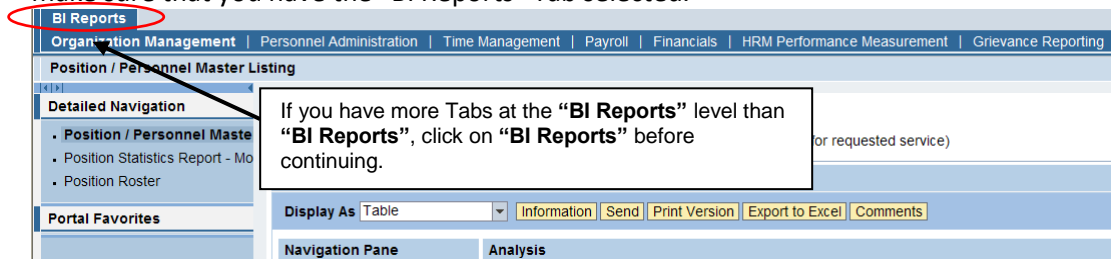
Helpful Hints Further instructions on BI Report features are available under BI Training materials, including the "BW/BI Grievance InfoCube" Self-Paced Learning Materials.

Procedure

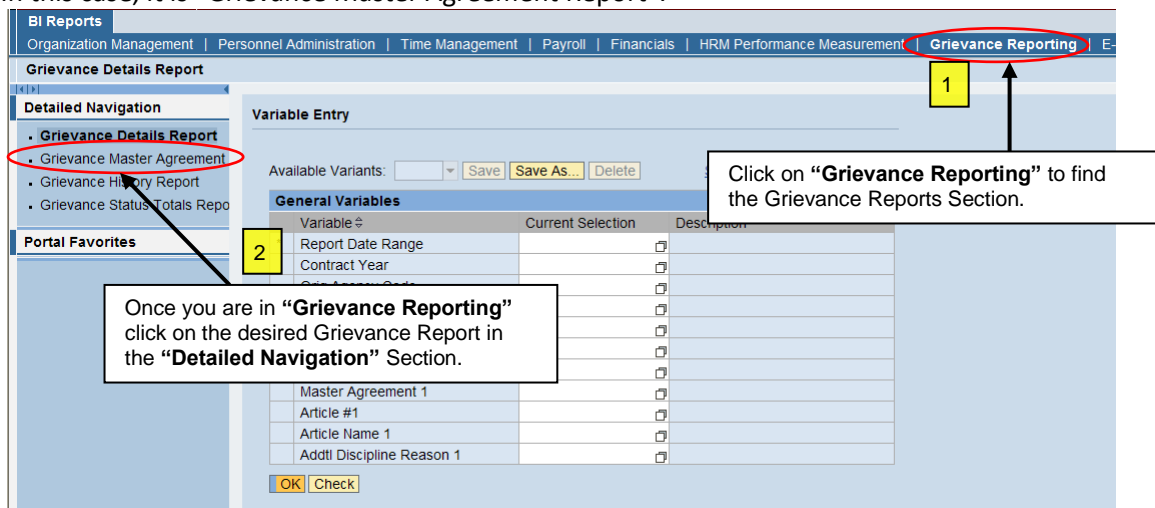
1. Go to the Portal using your normal Production link: <https://wahrms.wa.gov/irj/portal> . Sign onto “BI Reports” by entering your “User ID” (your complete state agency e-mail address) and your “Password” (your state agency network password). Press the “Enter” key or click on the “Log On” button.



2. The screen you see next will vary depending on your security access. You should see a Tab that says, “BI Reports” with other Tabs under it. If you have more Tabs at the “BI Reports” level, make sure that you have the “BI Reports” Tab selected.



3. Under “BI Reports”, click on “Grievance Reporting”. Your screen should look similar to the one below. It will default to the top report selection in the “Detailed Navigation” window on the left. In this case, it is “Grievance Master Agreement Report”.



- To run “Grievance Master Agreement Report”, click on it in the “Detailed Navigation” window. After a short delay, you will see the selection screen below.

BI Reports
 Organization Management | Personnel Administration | Layoff Data | Time Management | Payroll | Financials | HRM Performance

Grievance Master Agreement Report

Detailed Navigation
 Grievance Details Report
Grievance Master Agreement Report
 Grievance History Report
 Grievance Status Totals Report

Variable Entry

Available Variables: Save Save As... Delete Show Variable Personalization

Variable	Current Selection	Description
* Report Date Range		
Contract Year		
Orig Agency Code		
Orig Personnel Area		
Orig Bargaining Unit		
Grievance Status		
Step		
Master Agreement 1		
Article #1		
Article Name 1		
Addtl Discipline Reason 1		

OK Check

- Of the fields that appear on the Selection Screen, only the “Report Date Range” field requires an entry. Enter a valid date range to restrict the report results to a specific time period. To do this, click on the small square on the right side of the “Current Selection” box for “Report Date Range”. A popup menu will appear allowing the entry of a date range (see below).

BI Reports
 Organization Management | Personnel Administration | Layoff Data | Time Management | Payroll | Financials | HRM Performance Measurement | Grievance Reporting

Grievance Master Agreement Report

Detailed Navigation
 Grievance Details Report
Grievance Master Agreement Report
 Grievance Totals by Agency Report
 Grievance Articles Trend Report
 Grievance Detail Agency Report
 Grievance History Report
 Grievance Status Totals Report

Variable Entry

Available Variables: Save Save As...

Variable	Current Selection	Description
* Report Date Range		
Contract Year		
Orig Agency Code		
Orig Personnel Area		
Orig Bargaining Unit		
Grievance Status		
Step		
Master Agreement 1		
Article #1		
Article Name 1		
Addtl Discipline Reason 1		

OK Check

Date Range menu (all date menus may reference the “Close Date” in various spots – please ignore this, it is a software glitch; the description should be for the menu you selected.)

Operator:
 From: *
 To: *
 Enter an interval for
 Close Date:

Click the square here to bring up the menu for entering the Date Range.

- Click on the square on the right side of the “From” box to get to the “Calendar” menu (see below).

Personnel Administration | Time Management | Payroll | Financials | Grievance Reporting | E-Recruitment

Select values for Close Date (ZS_GRIEVANCECLSDT)

Show view: All

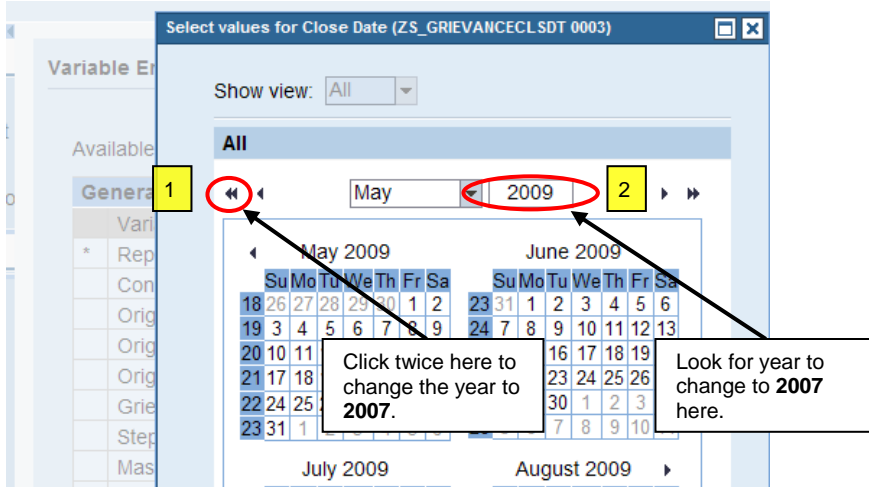
Value ranges

Sign:
 Operator: between
 From: *
 To: *

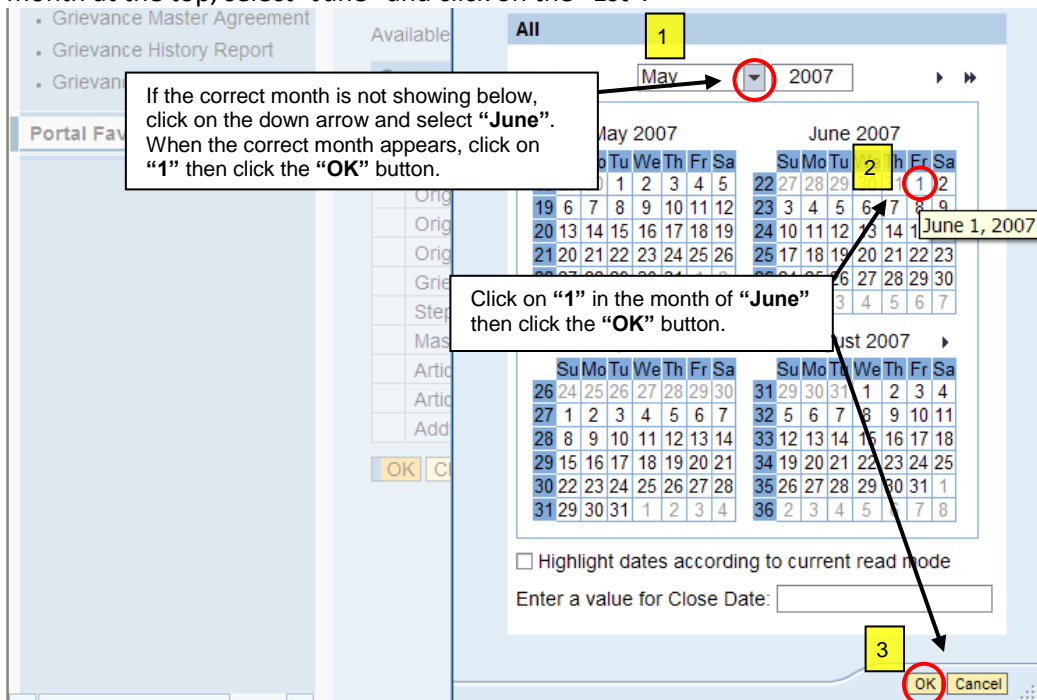
Calendar selection menu appears. Note references to “Close Date” again. Please ignore these and assume that it is referring to Report Date Range “From” date.

Click the square here to bring up the Calendar selection menu for entering the “From” or “Start” Date.

7. In this example, we are going to use the “Report Date Range” of June 1, 2007 to June 15, 2007. To enter the “From” date of June 1, 2007, click twice (waiting for the screen to refresh after each click) on the double left arrow to change the year to 2007 (see below).



8. Since the month of June is already showing as one of the four months on the menu, you can just click on “June 1st” then click the “OK” button. Otherwise you could click the down arrow for month at the top, select “June” and click on the “1st”.



9. You should see the “From” box filled in with 06/01/2007 (your settings may be formatted for DD/MM/YYYY, so you may see 01/06/2007).

Select values for Close Date (ZS_GRIEVANCECL.SDT 0003)

Show view: Value ranges

Value ranges

Sign: Include

Operator: between

From: * 06/01/2007 06/01/2007

To: *

Enter an interval for
Close Date:

OK Cancel

10. You have the option of repeating the same instructions for the “To” date (June 15, 2007), or you can type the date in directly following the same format as the “From” date. You should see the screen below. When it is filled out correctly, click the “OK” button.

Select values for Close Date (ZS_GRIEVANCECL.SDT 0003)

Show view: Value ranges

Value ranges

Sign: Include

Operator: between

From: * 06/01/2007 06/01/2007

To: * 06/15/2007 06/15/2007

Enter an interval for
Close Date:

OK Cancel

Click on “OK” to accept selections.

11. The screen will return to the original selection screen with the “Report Date Range” filled in. At this point, you may make additional selections using the other fields on the selection screen to further narrow the selected data returned. Once the report is run, you will also be able to apply “filters” on these fields and others to refine the data even more.
12. When you are finished selecting any other criteria, click on the “OK” button to see your report.

- Grievance Master Agreement
- Grievance History Report
- Grievance Status Totals Report

Available Variables: Save Save As... Delete [Show Variable Personalization](#)

Variable	Current Selection	Description
* Report Date Range	06/01/2007 - 06/15/2007	06/01/2007 - 06/15/2007
Contract Year		
Orig Agency Code		
Orig Personnel Area		
Orig Bargaining Unit		
Grievance Status		
Step		
Master Agreement 1		
Article #1		
Article Name 1		
Addtl Discipline Reason 1		

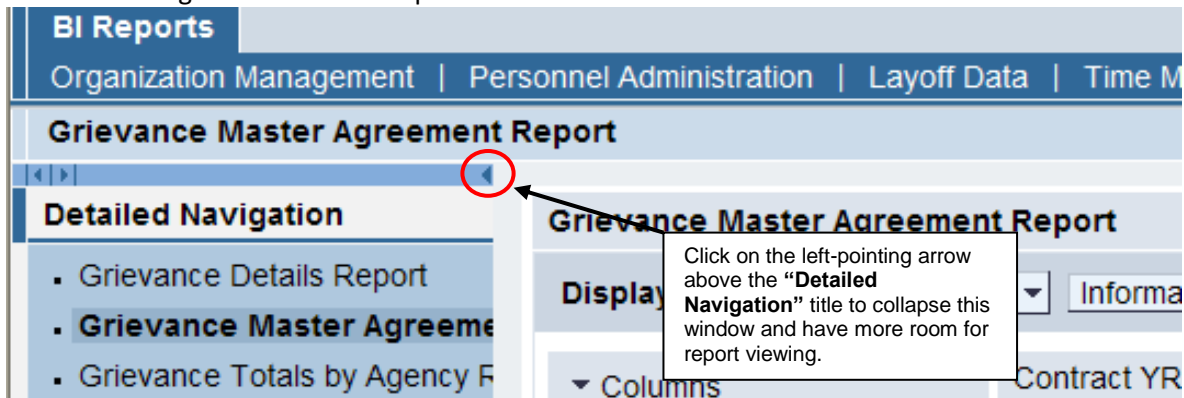
OK Check

Click on “OK” to run report after selections are complete.

13. The “Grievance Master Agreement Report” should appear on your screen, similar in appearance to the screen below. Because this report does not show the detail of each grievance record, but does show counts and totals of records on the right and at the bottom, this is called a “count” type report. Before you can use the report, however, you must add the “Closed Date” filters.

Contract YR1	Orig Agency Code	Orig Pers Area	Article Name1	Sub-Article Name1
07-09	3000	Dept of Social & Health Serv.	3000 DSHS Headquarters	Employee Rights
			3025 DSHS Region 5	Vacation Leave
				Vacation Scheduling
				Result
	4050	Department of Transportation	4050 Dept of Transportation	Hours of Work
				Result
	4610	Department of Ecology	4610 Dept of Ecology	Licensure and Certification
				Result
	4770	Department of Fish & Wildlife	4770 Dept of Fish & Wildlife	Management Rights
				Result
	4900	Dept. of Natural Resources	4900 Dept Natural Resources	Discipline
				Result

14. You can get more room for report viewing by clicking on the left-pointing arrow just above the “Detailed Navigation” title to collapse the window.



15. Your screen should now appear without the “Detailed Navigation” window. You may bring back the “Detailed Navigation” window at any time by clicking on the right-pointing arrow on the left edge of the screen, between the two “Grievance Master Agreement Report” titles (see red circle below).

Title: Business Intelligence Grievance Master Agreement Report via Portal

BI Reports
 Organization Management | Personnel Administration | Layoff Data | Time Management | Payroll | Financials | HRM Performance Measurement | **Grievance Reporting**

Grievance Master Agreement Report | History | Back

Grievance Master Agreement Report

Display As: Table | Information | Send | Print Version | Export to Excel | Comments

Columns	Contract YR1	Orig Agency Code	Orig Pers Area	Article Name1	Sub-Article Name1	Master Agreement
Master Agreement1	07-09	3000	Dept of Social & Health Serv.	3000	DSHS Headquarters	Employee Rights
Contract YR1			3025	DSHS Region 5	Vacation Leave	Vacation Scheduling
Orig Agency Code						
Orig Pers Area						
Article Name1						
						Result

- Right-click on "Closed Date" in the "Free characteristics" area on the left side of the screen. In the popup menu, move the mouse pointer over "Filter" and click on "Select Filter Value" from the sub menu (see below).

BI Reports
 Organization Management | Personnel Administration | Layoff Data | Time Management | Payroll | Financials | HRM Performance Measurement | **Grievance Reporting**

Grievance Master Agreement Report | History | Back

Grievance Master Agreement Report

Display As: Table | Information | Send | Print Version | Export to Excel | Comments

Columns	Contract YR1	Orig Agency Code	Orig Pers Area	Article Name1	Sub-Article Name1	Master Agreement
Master Agreement1	07-09	3000	Dept of Social & Health Serv.	3000	DSHS Headquarters	Employee Rights
Contract YR1			3025	DSHS Region 5	Vacation Leave	Vacation Scheduling
Orig Agency Code						
Orig Pers Area						
Article Name1						
Sub-Article Name1						
Key Figures						
Free characteristics						
Addtl Discipline Reason1						
Addtl Discipline Reason2						
Addtl Discipline Reason3						
Addtl Discipline Reason4						
Addtl Discipline Reason5						
Agency Code						
Agency LR						
Agency LR						
AGO Name						
Appt. Auth						
Arbitrator						
Article #1						
BU Code						
Close Date						
Discipline Reason						

- The "Closed Date" Filter menu should appear on the screen. This is the beginning of the "Close Date" filter process. You will have to apply two "Close Date" filters every time you run a Grievance report in BI to get accurate results.

- Click on the "Show tool" dropdown menu and select "Value Ranges" (see below)

Select values for Close Date (ZGRVCLDT)

Show tool: Single values | Show view: All

All | Value ranges | Selections

June 2009 | July 2009

Su	Mo	Tu	We	Th	Fr	Sa
23	31	1	2	3	4	5
24	7	8	9	10	11	12
25	14	15	16	17	18	19
26	21	22	23	24	25	26
27	28	29	30	1	2	3
28	5	6	7	8	9	10
29	12	13	14	15	16	17
30	19	20	21	22	23	24
31	26	27	28	29	30	31
32	2	3	4	5	6	7

August 2009 | September 2009

31 26 27 28 29 30 31 1 36 30 31 1 2 3 4 5

Add Remove

19. The screen should change to the one seen below. Click on the dropdown menu for “Operator” and select “Greater or equal”.

[illegible]

20. In the “From” field, type the date you used in the “Report Date Range” “From” field (i.e. the “Start” date of your selection range (see item 9 of these instructions)). The date may also be entered by clicking on the square at the right end of the field and selecting from the calendar menu (see item 6 of these instructions). For the example shown in these instructions, the “From” date is June 1, 2007.

Select values for Close Date (ZGRVCLDT)

Show tool: Value ranges Show view: Value ranges

Value ranges

Sign: Include Operator: Greater or equal

From: 06/01/2007

Enter a range for Close Date:

Selections

Type Description

Add Remove

Enter "From" date entered for "Report Date Range" on report selection screen.

If using Calendar menu for date entry, click here.

21. Now that you have selected the “Operator” and the “From” date, the filter needs to be migrated to the “Selections” window on the right side. To move the filter across to the “Selections” window, click on the right-pointing “Add” arrow. Once it has migrated to the “Selections” window, the date will appear in the “Description” column and the “Operator” will appear in the “Type” column. In the screen below, the migration has already occurred.

The screenshot shows a window titled "Select values for Close Date (ZGRVCLDT)". On the left, under "Value ranges", the "Sign" is set to "Include", the "Operator" is "Greater or equal", and the "From" field is empty. On the right, under "Selections", there is a table with two columns: "Type" and "Description". The first row shows "≥" in the "Type" column and "06/01/2007" in the "Description" column. Red dashed arrows point from the "Sign", "Operator", and "From" fields in the "Value ranges" section to the corresponding entries in the "Selections" table. A yellow box with the number "2" is placed over the "Add" button, which is a right-pointing arrow. A text box with an arrow pointing to the "Add" button states: "The 'Add' arrow was clicked to migrate the date and operator." Another text box with an arrow pointing to the "Selections" table states: "Date, Operator, & Sign migrate to the 'Selections' window." The "Add" button is circled in red.

22. Using the same screen, it is time to add the second filter. This filter will always be the same for the “Closed Date”. Its purpose is to ensure that all records without a “Closed Date” are included (i.e. all records with an Open, Pending, or Bypass status).
23. Click on the dropdown menu for “Operator” and select “Equal” and instead of typing in a date in the “From” field this time, type a “#” (uppercase “3” on the keyboard), without the quote signs, into the “From” field (see below).

The screenshot shows the same window as before, but with changes. In the "Value ranges" section, the "Operator" dropdown menu is open, showing "Equal" selected. The "From" field now contains the character "#". A text box with an arrow pointing to the "From" field states: "Type '#' (without the quote signs) into the 'From' field". Another text box with an arrow pointing to the "Operator" dropdown menu states: "Select 'Equal' from the 'Operator' dropdown menu." The "Add" button is still visible at the bottom. The "Selections" table on the right now has a "Select All" checkbox and a "Type" column with "06/01/2007" in the "Description" column.

24. To move the filter across to the “Selections” window, click on the right-pointing “Add” arrow. Once it has migrated to the “Selections” window, the “#” will appear in the “Description” column and the “Operator” will appear in the “Type” column. The screen below shows the “Operator” and “#” after migration. To accept both filters you have created, click on the “OK” button.

Results

The Grievance Master Agreement Report should refresh on your screen with less data than before. Scroll all the way to the right of the report. You will now be able to see that the “Closed Date” filters you just applied are working correctly (see below).

The screenshot shows the BI Reports interface with the following components:

- Navigation Bar:** Organization Management | Personnel Administration | Layoff Data | Time Management | Payroll | Financials | HRM Performance Measurement | **Grievance Reporting**
- Report Title:** Grievance Master Agreement Report
- Actions:** History, Back, Forward
- Display As:** Table (selected), Information, Send, Print Version, Export to Excel, Comments
- Columns:**
 - Contract YR1
 - Orig Agency Code
 - Orig Pers Area
 - Article Name1
 - Sub-Article Name1
 - Master Agreement1
 - Coalition
 - IPFTE
- Data Rows:**
 - Row 1: Contract YR1 07-09, Orig Agency Code 3000, Dept of Social & Health Serv., Orig Pers Area 3000, DSHS Headquarters, Article Name1 Employee Rights, Sub-Article Name1 Not assigned, Master Agreement1 Number of Primary Ar, Coalition, IPFTE.
 - Row 2: Contract YR1 Result, Orig Agency Code, Orig Pers Area, Article Name1, Sub-Article Name1, Master Agreement1 Number of Primary Su, Coalition, IPFTE.
 - Row 3: Contract YR1 4050, Orig Agency Code Department of Transportation, Orig Pers Area 4050, Dept of Transportation, Article Name1 Hours of Work, Sub-Article Name1 Not assigned, Master Agreement1 Number of Primary Ar, Coalition, IPFTE.
 - Row 4: Contract YR1 Result, Orig Agency Code, Orig Pers Area, Article Name1, Sub-Article Name1, Master Agreement1 Number of Primary Su, Coalition, IPFTE.
 - Row 5: Contract YR1 4610, Orig Agency Code Department of Ecology, Orig Pers Area 4610, Dept of Ecology, Article Name1 Licensure and Certification, Sub-Article Name1 Not assigned, Master Agreement1 Number of Primary Ar, Coalition, IPFTE.
 - Row 6: Contract YR1 Result, Orig Agency Code, Orig Pers Area, Article Name1, Sub-Article Name1, Master Agreement1 Number of Primary Su, Coalition, IPFTE.
 - Row 7: Contract YR1 4770, Orig Agency Code Department of Fish & Wildlife, Orig Pers Area 4770, Dept of Fish & Wildlife, Article Name1 Management Rights, Sub-Article Name1 Not assigned, Master Agreement1 Number of Primary Ar, Coalition, IPFTE.
 - Row 8: Contract YR1 Result, Orig Agency Code, Orig Pers Area, Article Name1, Sub-Article Name1, Master Agreement1 Number of Primary Su, Coalition, IPFTE.
 - Row 9: Contract YR1 4900, Orig Agency Code Dept. of Natural Resources, Orig Pers Area 4900, Dept Natural Resources, Article Name1 Discipline, Sub-Article Name1 Not assigned, Master Agreement1 Number of Primary Ar, Coalition, IPFTE.
 - Row 10: Contract YR1 Result, Orig Agency Code, Orig Pers Area, Article Name1, Sub-Article Name1, Master Agreement1 Number of Primary Su, Coalition, IPFTE.